







Population Leadership Program Fellow

The Population Leadership Program (PLP) staff strives to achieve quality experiences for Fellows, HARs, and support staff, as well as organizational satisfaction for USAID and the Public Health Institute (PHI). The strong working relationships we enjoy with our colleagues are crucial to the growth and success of our program. Timely and accurate information helps us all achieve our goals, which is why we designed this orientation guide. We hope that it will:

- Provide a comprehensive overview of your fellowship orientation
- Bring clarity and simplicity to your role during orientation
- Offer efficient support and references

Orientation begins prior to your start date, and culminates approximately four months into the fellowship with the delivery of an annual workplan and a solid professional development plan. We structure orientation in 5 discrete time periods (see chart, next page):

Timeline	Supporting materials	
Pre-start (~1 month before start)	Overview; Fellows checklist	
First day	Overview; Fellows checklist	
2nd - 5th days	Overview; Fellows checklist;	
	one-on-one meetings aid	
First 6 weeks	Overview; Fellows references	
First 4 months	Overview; Fellows reference,	
	one-on-one coaching	

PLP staff delivers counterpart materials to the HAR and your Welcome Buddy during the pre-start period.

We look forward to working with you.

Your PLP Contact Name: Position: Phone: Email:

- Program Orientation for Fellow
- Program Orientation for HAR
- Background resource materials delivered
- USAID Security briefing
- Conflict of interest discussed

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Activities initiated by you are in bol



- HAR Meeting
- Welcome Buddy
- CTO meeting
- Orientation to RRB
- Lunch
 - 1-on-1s with SMT and key staff
 - Library orientation
 - Online resources orientation
 - Support services orientation
 - Start USAID overview
 - Schedule key meetings
 - Create initial workplan (1st month)
 - HAR meetings
 - Division overviews
 - Technical documents
 - CA meetings
 - USAID sessions

- Annual workplan complete
- Professional development plan complete

First day

First week

Within 6 weeks

Within 4 months

Pre-start 30 days

YOUR PRE-START DATE—OVERVIEW



Objective

You, your HAR and PLP staff will share mutual expectations of the fellowship goals, fellowship support, and your orientation plan.

Results

By your start date:

1. Your HAR and a PLP staff member will:

- **a.** Reach a mutual understanding of the HAR role, responsibilities and expectations vis-à-vis the PLP role, responsibilities and expectations; your scope of work, and expected professional development during the fellowship.
- **b.** Identify key contacts, working groups, etc. to meet with during the first six weeks of your assignment.
- c. Identify key background documents you will need to review.
- d. Finalize terms in the Memorandum of Understanding.

2. You will meet PLP staff to:

- a. Understand the vision and mission of fellowships
- b. Understand PLP staff roles and the fellowship support team
- c. Understand security protocols
- d. Review personnel and travel policies
- e. Review just-in-time online resources
- f. Receive key background documents for review
- g. Discuss USAID culture and the HAR role
- h. Finalize terms in the Memorandum of Understanding
- 3. Learn about PLP's learning and evaluation philosophy and tools.
- 4. You will receive a USAID security briefing and security badge.

Activities

ACTIVITY	LEAD	TIME
HAR-PLP staff meeting	PLP Contact	1 Hour
Your PLP orientation	PLP Contact	2 Days
Orientation to Learning and Evaluation	You: PLP Contact	1 Hour
Attend USAID Security briefing	You: PLP Contact	4 Hours
Review background documents	You	Variable

YOUR PRE-START PLP CHECKLIST

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CHECKLIST

MY HIRING PAPERWORK IS **COMPLETE**

SCOPE OF WORK:

I understand the Host Agency Representative role.

I understand my supervisor's role.

I discussed PHI's conflict of interest policy with a PLP staff member, and have resolved or am in the process of resolving conflicts of interest regarding my fellowship.

I understand how an annual workplan differs from a scope of work, when annual workplans are due, and how they relate to performance.

I understand when and why professional development plans are due, how they relate to fellowship goals, and where I can find resources.

I have an overview of the 360 evaluation process.

LEADERSHIP AND PROFESSIONAL **DEVELOPMENT:**

I discussed leadership concepts and frameworks with PLP staff.

I discussed expectations and support for professional development during the fellowship.

I have reviewed the leadership resources available through PLP's website.

I understand I can have a personal coach through PLP.

PAYROLL:

I understand how to complete my timesheet.

I know when my timesheets are due.

I understand how vacation and sick leave accrue.

YOUR PRE-START PLP CHECKI

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CHECKLIST

I understand the startup of direct deposit for my salary and have provided a correct mailing address for the first paper check(s).

I know how to print replacement timesheets from PLP's website.

I sent a copy of my workplace holiday schedule to my PLP contact.

I understand what deductions payroll will make from my paycheck, both voluntary (e.g., FlexPlan, GSRE contribution), and mandatory (e.g., social security, Medicare).

I have been offered a formal tax consultation regarding my overseas allowances (overseas fellows only).

I understand when and why my post differential starts and stops (overseas fellows only).

BENEFITS

I understand which benefits are available to me and which are available to my dependents (if applicable). This includes:

- Primary medical plan
- Flexible Benefit Plan
- TIAA-Cref Group Retirement

Annuity (GRA)

- TIAA-Cref Group Supplemental Retirement Annuity (GSRE) and salary reduction form
- Vision plan-Vision Services Plan (VSP)
- Dental plan-Delta Dental
- Employee Assistance Program

(EAP, through Aetna Magellan or Pacificare)

- Alternative Medical Care Reimbursement (AMCR)
- Public Transportation Reimbursement
- Enrollment fee for new gym membership

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YOUR PRE-START PLP CHECKLIST

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CHECKLIST

I know where to find the contact list for my plan provider(s).

I have my SOS International insurance card.

I know how to be reimbursed for the Delta Dental \$50 deductible.

I know when to contact PLP for changes to TIAA-Cref vs. contacting TIAA-Cref directly.

REIMBURSEMENT AND

EXPENSE CLAIMS:

I understand that my reimbursements are mailed to my home address (or other address I have specified).

I understand the reimbursement cycle.

I understand when to use a check request form and can access the information online.

I understand travel policies, when and how to submit a travel claim, travel advance request, and (if applicable) a USAID travel worksheet.

OFFICE SETUP:

I know how to login to PLP's website.

I know how to access forms and information on PLP's website.

I received and loaded the orientation website bookmarks into my "Favorites" folder in my web browser.

I understand how to obtain office supplies.

I understand how to order office supplies online through Staples.com, when the orders will be placed, and when and where to pick up my orders (domestic fellows only).

I know how to send mail to PLP, and when to expect mail from PLP.

YOUR PRE-START PLP CHECKLIST

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CHECKLIST	NOTES
I know when I will receive my business cards.	
I have been apprised of what to do in the event of an evacuation (overseas fellows only).	
SUPPORT: I know how to reach my primary contact by phone, fax and email.	
I understand my primary contact welcomes all comments and suggestions regarding this orientation, and ongoing support.	

YOUR PRE-START USAID CHECKLIST



 CHECKLIST	NOTES
Review HAR role and responsibilities.	
Review co-HAR structure, if applicable.	
Discuss HAR role vis-a-vis supervisor's role.	
Finalize terms in Memorandum of Understanding, if applicable.	
Review key contacts and working groups to meet in the first six weeks.	
Collect key background documents to review.	

YOUR FIRST DAY—OVERVIEW



Objective

Familiarize yourself with the work environment and the RRB and settle into your workspace. Begin learning how to function comfortably within USAID.

Results

By the end of the first day:

- 1. You and your HAR will discuss the Division structure; visions, goals and strategic objectives; team structure, and team member roles.
- 2. You will have met PLP's CTO and understood the CTO role.
- 3. Team members will have met and welcomed you.
- 4. You will have access to key documents and background materials for your Scope of Work.
- 5. You will know how to use relevant email and telephone functions.
- 6. You will be oriented to the RRB (including security procedures).

Activities

ACTIVITY	LEAD	TIME
Meet your HAR-Division overview: strategic objectives, team member roles, divisional relationship to Office.	HAR	1 Hour
Receive appropriate technical background materials-be oriented to key documents for Scope of Work, status reports of pending issues, USAID GH referral list, etc.	HAR or Welcome Buddy	30 Minutes
CTO meeting-explain the CTO role, relationship to you, and expectations.	СТО	30-45 Minutes
Lunch-develop relationships with your core team.	HAR, et. al.	1 Hour
Workstation orientation-learn how to use the telephone, set up email, locate fax, printer, copier and office supplies.	Welcome Buddy	1 Hour
Building orientation-find paths to your workspace, restrooms, elevators, etc. Learn how security procedures affect your access.	Welcome Buddy	1 Hour
PLP check-finalize any hiring questions and pending forms with your primary contact.	PLP Contact	30 Minutes

YOUR FIRST DAY—CHECKLIST



 CHECKLIST	NOTES
Meet your Welcome Buddy-discuss expectations and activities during your first week.	
Meet with HAR-receive Division overview: strategic objectives, team members, relationship to Office and Bureau.	
Receive appropriate technical background materials-be oriented to key documents for Scope of Work, status reports of pending issues, etc.	
Lunch.	
Meet your CTO.	
Equipment orientation: computer, printer, fax, copier	

YOUR FIRST DAY—CHECKLIST



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	Phone orientation: setting outgoing messages, forwarding calls, rolling calls directly to voicemail, etc.	
	E-mail orientation: creating electronic signatures, scheduling meetings, Out of Office Assistant, Folder view, Calendar view	
	Floor walkaround: cube location, elevators, restrooms, fire exits.	
	Building walkaround: entry and exit points, including after hours; security office; library, food court, and parking garage location; metro access. Understand how security affects your access.	

YOUR 2nd-5th DAYS—OVERVIEW



Objective

You will begin learning how to function effectively within the structure of USAID; learn what resources are available and where they are located; and integrate with team members.

Results

Clear mutual understanding of how to achieve excellent performance and progress within USAID; your first month workplan and deliverables identified.

1. You and your HAR will:

- a. Understand your mutual expectations and work styles.
- b. Define the first month's immediate work activities and deliverables.
- c. Identify key background documents you will need to review.
- d. Finalize terms in the Memorandum of Understanding.
- **2.** You will have a one-on-one with each Senior Management Team member and other key staff members to understand roles and collaborative opportunities.
- 3. You, with assistance from your HAR/Welcome Buddy, will:
 - a. Arrange to meet with key contacts, working groups and cooperating agencies.
 - **b.** Understand how to use library and web-based resources.
 - c. Understand computer security and team protocol for electronic file storage.
 - d. Gain an overview of priority issues related to your technical scope of work.

Activities

ACTIVITY	LEAD	TIME
Meet with HAR: address unit vision and mission; expectations, work styles, activities and first month's deliverables.	HAR	2 Hours
One-on-one meetings with SMT members and other key staff.	You/Team	30 Min. ea.
CDIE Library orientation and online resources.	You	6 Hours
Arrange offsite meetings with key contacts, working groups and cooperating agencies.	You	2 Hours
Observe staff meeting of one other Office division	You	1 Hour
Lunch with Supervisor	Sharon Rudy	1 Hour
Computer Security and electronic file storage	Welcome Buddy	30-45 Minutes
PaL-Tech Orientation	Welcome Buddy	1 Hour
Discuss relationship between Congress and USAID	Welcome Buddy	1 Hour

YOUR 2nd-5th DAYS—CHECKLIST



\checkmark	CHECKLIST	NOTES
	At the end of this discussion you and your HAR should arrive at a mutual understanding of the technical advisor role.	
	USAID CULTURE: How does the USAID culture affect the role of a technical advisor? For example, how do the "Fellows' Guidelines" relate to this position?	
	Work STYLES: How do you best receive and respond to information-ad hoc messages, batched messages? What is a positive way to get your attention: via email, phone, memo, in person?	
	PRIORITIES: What is important this month? What are the deliverables? What may help or hinder this schedule?	
	PRIORITIES: Keep in mind that six basic factors affecting performance are: 1. Job expectations 2. Performance feedback 3. Motivation 4. Management systems and leadership 5. Knowledge and skills 6. Facilities, equipment and supplies	
	Lunch with Sharon Rudy, your Supervisor	

YOUR 2nd-5th DAYS—CHECKLIST

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CHECKLIST

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Orientation to computer security and standards for electronic file storage/key points:

- Use of shared drives and personal drives.
- File naming and access classifications (group access, restricted access, etc.
- IRM assistance

Orientation to PaL-Tech/key points:

- Understand what PaL-Tech can and can't
- Meet key PaL-Tech support staff

Discuss relations between Congress and USAID:

- What is the current environment on the Hill regarding USAID?
- Who are the key Congressional players in decision affecting USAID
- How does USAID handle Congressional requests for information?
- How does this relate to your work?

Attend staff meeting of one other Division in Office/key points:

- You are an observer
- Acquire pre-approval from you HAR and the other Division Chief; at meeting, buddy with one person in the other Division

YOUR 2nd-5th DAYS— ONE-on-ONE MEETINGS



Objectives

Initiate one-on-one meetings with team members and develop understanding of professional experiences leading to your position at USAID and review your professional roles at USAID.

Results

Learn how to take advantage of professional synergy and develop your professional network.

Information Exchange

- How you came to be involved in international development. What keeps you motivated?
- How you arrived in this particular office.
- Your main responsibilities: how do they relate to your unit's strategy and to the strategic framework of USAID?
- How your work at USAID relates to overall professional goals.
- How your work overlaps.
- Who you both know at USAID and at relevant external agencies.

NOTES (key points, new contacts & areas of expertise)

Provide a photocopy of this page to the person with whom you are meeting.

YOUR FIRST 6 WEEKS—OVERVIEW



Objectives

You will know what you need to do and have the contacts and resources necessary to move forward.

Results

You will:

- 1. Have a detailed picture of your responsibilities and priorities.
- 2. Understand the relationship between your Division and other Divisions in your Office and/or Bureau.
- **3.** Meetings with all relevant cooperating agencies (CA) to understand their goals, objectives, and responsibilities, and define your relationship.
- 4. Make courtesy calls (following protocol) to Office Chief and Bureau/Mission Chief.
- 5. Read background technical documents.
- 6. Meet with relevant working groups and contacts (e.g., JPPT, Gender, FGC).
- 7. Complete basic USAID knowledge requirements (e.g., project management skills review, communications/presentations course).
- 8. With assistance from PLP, identify and prioritize relevant professional development opportunities.

Activities

ACTIVITY	LEAD	TIME
Meet with HAR: discuss and receive guidance on work in progress.	HAR/ you	45 min. each
Attend staff meetings of all Divisions in Office.	You	1 Hr. each
Attend overview sessions for 3 GH Offices other than own Office.	You	1 Hr. each
Abosrb content of background technical documents.	You	variable
Meet counterparts in relevant CAs	You	1 Hr. each
Introduce self to Office and Bureau/Mission Chief (follow protocol)	You/HAR guidance	15 min. each
Meet with PLP staff member to draft Professional Dev. Plan	You/PLP staff	1-3 Hrs.
Attend 3 select USAID courses to increase understanding of USAID environment.	You/HAR approval	6 Hrs. total



- Which work objectives are progressing particularly well at this time? Why? If roadblocks are impeding progress, what might be effective methods for working around these?
- How is the USAID GH Referral list useful?
- What is the long-term view? What is happening in the future that will affect your work objectives? Are circumstances and conditions changing? Will you be involved with the same key stakeholders?
- Which professional development opportunities interest you?

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- How do your Divisions complement each other?
- What key issues relate to your work?
- Who are your key contacts in this division?

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Division:	

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- How do your Offices complement each other?
- Which key issues relate to your work?
- Who are your key contacts in this office?

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Office:		 	
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- Which key issues relate to your work?
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Office:		 	
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Meeting with Cooperating Agencies (CA): Points to Consider

- How do your goals complement each other?
- What are your expectations?
- Who are your key contacts and what is your relationship with them?
- What is the long-term view?

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Meeting with Cooperating Agencies (CA): Points to Consider

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Meeting with Cooperating Agencies (CA): Points to Consider

- How do your goals complement each other?
- What are your expectations?
- Who are your key contacts and what is your relationship with them?
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Meeting with Cooperating Agencies (CA): Points to Consider

- How do your goals complement each other?
- What are your expectations?
- Who are your key contacts and what is your relationship with them?
- What is the long-term view?

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Attending Select USAID Sessions: Points to Consider

- What are key points of this session? How do they relate to your work?
- Who is a resource for me?

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Attending Select USAID Sessions: Points to Consider

- What are key points of this session? How do they relate to your work?
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YOUR FIRST 4 MONTHS—OVERVIEW



Objectives

You will finalize your annual workplan and professional development plan with your HAR.

Results

You will:

- 1. With assistance from PLP, draft a professional development plan for your HAR's review.
- 2. Provide your first annual workplan to PLP.

Activities

ACTIVITY	LEAD	TIME
Finalize annual workplan with HAR.	You	45 min.
Finalize professional development plan with HAR.	You	15 min.

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YOUR 1st 4 MONTHS—REFERENCE



Professional Development: Points to Consider

- What development goals have you identified?
- How does your leadership style influence your goals?
- How do your goals relate to your work (note: goasl do not need to coincide perfectly with your scope of work)
- What time commitments might be involved?

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Accelerate Your Professional Development with Coaching

What is coaching?

Coaching is a powerful process that helps you hone your management and leadership skills in just the areas you want. Coaching deepens your learning, helping you develop new knowledge and skills in line with your professional interests. It may also help you to overcome barriers and assumptions that do not serve your interests.

Why get coaching?

One of the most important benefits of being a PLP Fellow is that you have access to a coach. A coach is often the most effective way for you to acquire new skills, get objective guidance and feedback on work issues, and explore your values.

You can select and use a coach for a variety of purposes, including:

- Improving your skills in a variety of areas including management and leadership, communications, budgeting and financial, interpersonal relations, and various technical areas
- Exploring your approach to career issues, dealing with specific on-the-job concerns, balancing your work life with other life goals, and
- Planning the next steps in your career after completing your fellowship.

What does coaching require of me?

Coaching isn't something that happens to you; it happens through you. A coach stands outside of your frame of reference, and helps you see new possible solutions to your current challenges. A coach is your confidential consultant, who gives you honest feedback to help you develop the skills that you agree you need to develop. To benefit from coaching, you should choose a coach who is skilled in the areas in which you want to develop, and with whom you feel comfortable. Coaching requires you to consider other frames of reference and new approaches to your own development.

Distance coaching

If you are working outside the U.S., you can get coaching largely via telephone and e-mail. One stipulation: Because a good relationship is very important to coaching, you need to have at least one initial face-to-face meeting with your coach. You can accomplish this during your orientation period before traveling to your work location, or during a visit back to the States.

How do I find my coach?

To select a coach, first read their biographical sketch on the PLP web site. Then contact a couple of coaches to discuss the areas in which you'd like to focus. Ask the coaches how they will work with you on those areas. Select the coach whose approach makes most sense to you. Then contact PLP's manager of professional development (Rich Pearlstein, rpearlstein@popldr.org) to discuss your selection and arrange for coaching sessions.

For more information on coaching . . .

See the Professional Development Primer on PLP's web site.